

Proxy and Firewall Setup for MS CRMi On-Premise

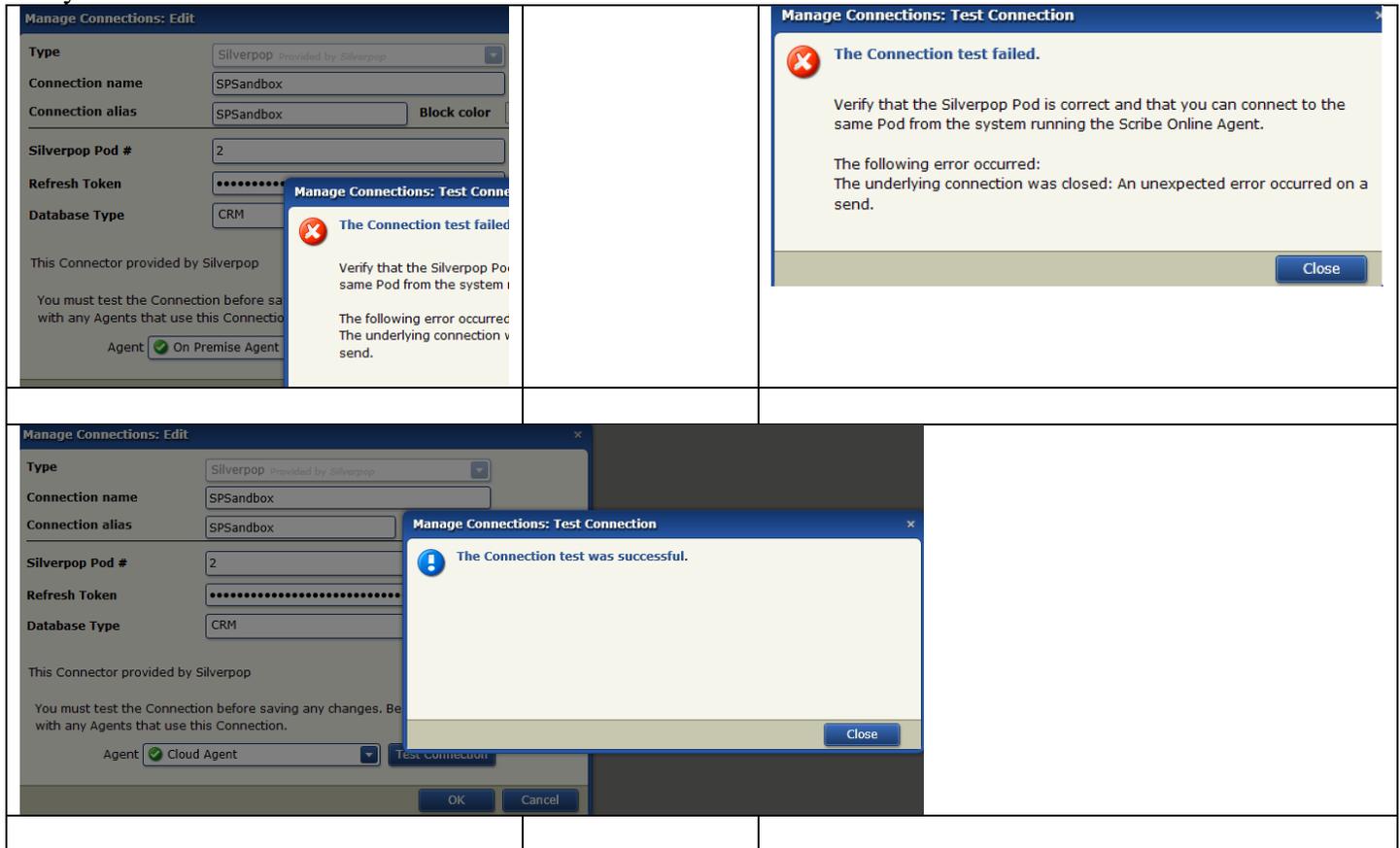
Setting up Scribe Online On-Premise Agents to work with Proxy Servers

Scribe Online has detailed instructions on proxy and firewall settings needed to allow communication between your server and Scribe Online. Please review the Help Center link below for more information as it may relate to your environment needs.

<http://www.scribesoft.com/helpcenter/prod/online/en/sol/agent/proxyinstall.htm>

The above article tells how to allow the On-Premise Agent to talk to the Scribe Online application and run solutions. Since the agent will also be used to talk to another application, IBM Marketing Cloud, you need to ensure the computer where the agent is installed can access IBM Marketing Cloud.

If the computer doesn't have access, when attempting to create a connection to IBM Marketing Cloud an error will be displayed suggesting maybe the pod number is incorrect and it says to verify you can connect to the same pod from the system running the Agent. The only way to do so is to login to IBM Marketing Cloud from the system.



If you test the same connection with a Cloud Agent and its successful the pod is correct, the computer just doesn't have access to IBM Marketing Cloud through the proxy.

Allowing your On-Premise environment to access IBM Marketing Cloud

If you are connecting to IBM Marketing Cloud programmatically from an in-house Application, like Microsoft Dynamics CRM On-Premise, where a proxy server maybe configured, some additional steps are required to allow communication to IBM Marketing Cloud through the proxy. This process assumes that the internal network Application is using Windows Authentication for access through the proxy server.

- Make sure that the following TCP ports are open (if needed, talk to your IT Administrator): Ports 80, 443. These ports are for communicating with IBM Marketing Cloud Servers.
- Set up an Active Directory account with permissions to go through the proxy.
- Add your designated IBM Marketing Cloud POD to your firewall. To get the valid address range from your CRM servers location:

1. Open a Command prompt
2. Type in ping “engage#.silverpop.com” or “api#.silverpop.com” (# represents the pod number assigned to your IBM Marketing Cloud organization)

```
CA Select Administrator: C:\windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

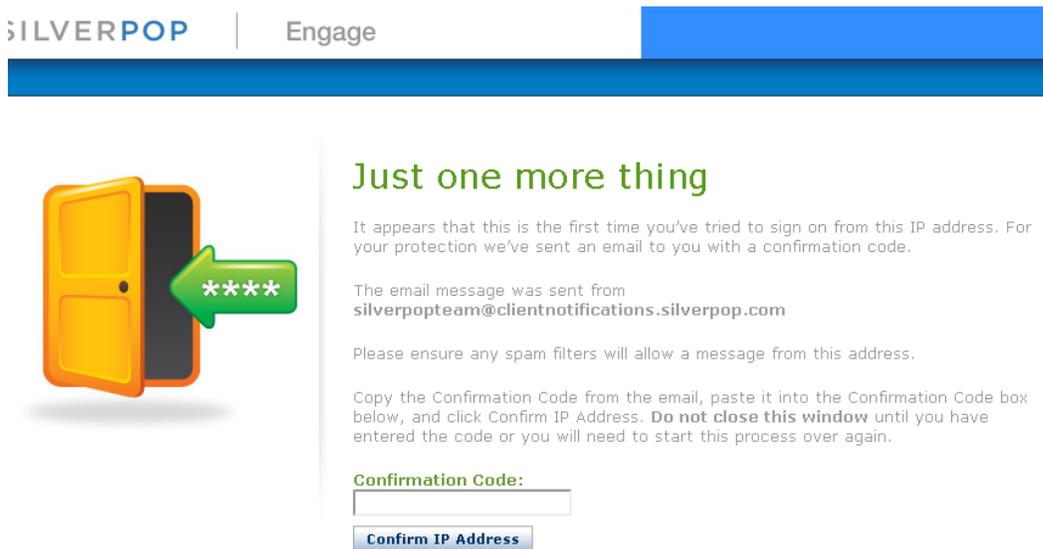
C:\Users\IBM_ADMIN>ping api4.silverpop.com

Pinging api4.ibmmarketingcloud.com [74.121.50.23] with 32 bytes of data:
Reply from 74.121.50.23: bytes=32 time=56ms TTL=243
Reply from 74.121.50.23: bytes=32 time=32ms TTL=243
Reply from 74.121.50.23: bytes=32 time=65ms TTL=243
Reply from 74.121.50.23: bytes=32 time=55ms TTL=243

Ping statistics for 74.121.50.23:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 32ms, Maximum = 65ms, Average = 52ms
```

- Log into your IBM Marketing Cloud organization from the CRM server where the Scribe Online On-Premise Agent will installed.

When you login for the first time from the server, use the IBM Marketing Cloud admin account that will synchronize records. You will be prompted to confirm your IP address.



The email with the code is sent to the **Notification email address** for the IBM Marketing Cloud admin user

IP Confirmation Code

silverpopteam@clientnotifications.silverpop.com

ent: Wed 2/12/2014 7:07 PM

o: Sharon Harvey

Before you can access our software from this computer, we need to confirm your IP address. Please copy the Confirmation Code below and return to your browser. Then, paste the code into the Confirmation Code box and follow the on screen instructions. If you have already closed the browser window, you will need to request another code.

Confirmation Code: eR8ol+wkBvQA!JK4

This code is valid for a limited period of time.

If you were not expecting this email, please contact your Support Representative immediately.

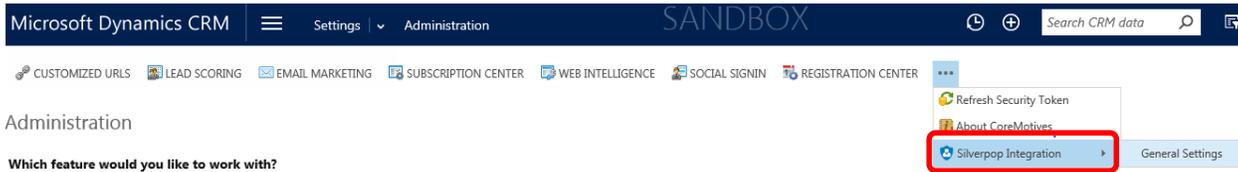
This email was sent by an automated system and the mailbox is not monitored. Please contact Customer Support directly with any concerns or feedback.

After you complete the IP confirmation, the specified IBM Marketing Cloud admin user, and the Scribe Online On-Premise agent, can interact with IBM Marketing Cloud via API from the CRM server.

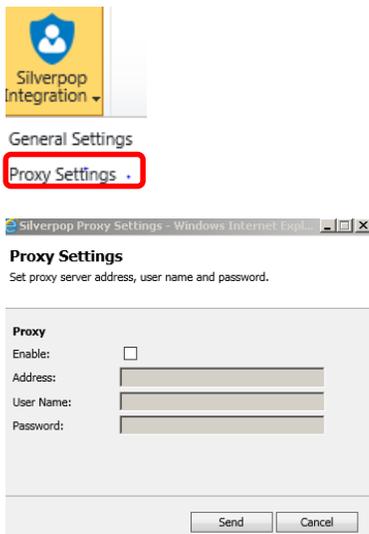
******The following set of instructions only applies once the MS Dynamics CRM administrator has imported the Silverpop Integration solution. These steps are needed to ensure Send Silverpop Email and Contact Insight work properly.

Edit Silverpop Integration in MS Dynamics CRM

1. Within MS Dynamics CRM, go to Settings → Administration, click on the Silverpop Integration → Proxy Settings



The above pic is from a 2013 online environment for reference of where to find the **Silverpop Integration** button. An On-Premise environment will include the **Proxy Settings** option.



2. The **Silverpop Integration Settings** section holds the information needed to logon to IBM Marketing Cloud programmatically. In the **Proxy Settings** section, check Enable Proxy, Input the Proxy Address determined by your company's Network administrator. Input the Proxy Username and Proxy Password needed to connect to the Proxy Address.

3. Save the changes made to the Silverpop Integration Settings.

4. Refresh CRM (F5) or perform an iisreset (cmd prompt and iisreset).